ISG Provider Lens®

ServiceNow Ecosystem Partners

ServiceNow partner evaluation on competitive strengths, service portfolio and innovation potential

Customized report courtesy of:

Atos

QUADRANT REPORT | MARCH 2026 | U.S.

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U.S. ServiceNow ecosystem shifts from *technical rollout* to governed, outcome-led autonomy

The 2026 U.S. ServiceNow Ecosystem Partner report assesses how service providers are enabling enterprises to convert the Now Platform into a governed system of action, where agentic AI, observability led operations and upgrade safe architectures translate intent into measurable outcomes. The study evaluates three quadrants — Consulting and Implementation, Managed Services and Innovation on ServiceNow. This framework covers the end-to-end functionality of ServiceNow ecosystem and enables service providers and enterprises to shift from strategy to scaled production.

The U.S. landscape has shifted decisively from project-based delivery to advisory led modernization, featuring value engineering upfront and XLA/ROI tracking in run state. Together with platform consolidation and industry blueprints, this shift moves organizations from isolated deployments to governed autonomy encompassing auditable architectures that can be upgraded and expanded without sacrificing control.

Market context — the forces reshaping the U.S. ecosystem

AI is now the default: In new implementations and in-run operations, U.S. buyers expect Now Assist capabilities and multi-agent patterns (A2A) to be available and safe on day one. Providers are responding to this by embedding AI Control Towers (for model/agent governance, lineage and rollback) directly into reference architectures rather than treating them as optional add-ons.

From observability to autonomy: Large U.S. estates are integrating observability telemetry and AIOps into workflows, enabling the platform to not only log events, but also detect, decide and resolve. As incident priority is tied to business impact, automation density becomes a leading indicator of value, not the number of closed tickets.

Consolidation to a backbone: With budget and risk pressures rising, enterprises are

Agentic AI raises **U.S.** expectations, pushing partners beyond **implementation to strategy**.

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consolidating point tools and elevating ServiceNow to a platform of platforms, the workflow backbone that orchestrates IT and non IT domains while preserving compliance. This consolidation improves upgrade cadence, data quality and the adoption of new capabilities.

Industry verticalization at scale: Current demand concentrates in BFSI, healthcare, telecom, manufacturing and the public sector, where compliance-ready blueprints and domain data models compress time to value and reduce transformation risk. Buyers increasingly choose providers based on the strength of their ready to deploy patterns.

Emphasizing regulation and compliance: *Secure AI at scale* has become an architectural requirement. AI governance, agent/machine identity, audit trails and sovereign/regulated deployment patterns are expected, especially in BFSI, healthcare and the public sector.

Enterprise priorities — how service providers are adopting and scaling

Start with advisory and value, not build plans: U.S. programs begin with platform fit, CSDM/CMDB readiness, integration strategy and value discovery (often TBM/FinOps linked). This enables teams to commit to engineering, anchored in upgrade safe, back to box designs that minimize custom debt and preserve release velocity.

Treat AI as a run time operating discipline: For most clients, *leveraging AI* is insufficient without skills, tuning and governance to sustain outcomes. They deploy Now Assist and agents alongside AI Control Towers and human in the loop controls to keep autonomy safe and auditable.

Consolidate to move faster and spend smarter: Consolidation programs position the platform as the orchestration layer across IT and business operations. This enables consistent data models and accelerates cross suite rollouts, particularly when paired with factory re-platforming and instance consolidation.

Prioritize vertical outcomes over toolkits: Enterprises prioritize industry blueprints that align data, controls and process templates to regulated workflows:

- **BFSI:** Operational resilience and risk workflows with non-negotiable compliance
- **Healthcare/Life sciences:** Member/patient operations, regulatory workflows and experience modernization under strict guardrails
- **Public sector:** Secure/sovereign patterns and packaged templates with governance first AI
- **Telecom and manufacturing:** Observability driven autonomy connecting network/plant telemetry to service workflows

Measure value relentlessly: U.S. clients demand XLA dashboards and outcome contracts that tie funding to adoption and performance (for example, deflection, MTTR and EX/CSAT), with benefit calculators and live telemetry informing renewal and expansion.

Decoding buyer behavior: Deal size is fragmenting downward as midmarket entrants use ServiceNow as a fast path into AI. However, they carry a premium tolerance for governed outcomes rather than raw feature counts. Consulting and implementation are splitting. Pathfinding remains human centric, while execution is expected to become increasingly automated by agents over time. Consulting and implementation are diverging into two distinct motions: pathfinding remains a human led activity, focused on strategy, value, and governance, while execution is becoming increasingly automated, with agents taking over more delivery tasks over time.

Provider Dynamics — how supply is reorganized to meet U.S. demand

From delivery shops to *strategy through run* partners: Providers now initiate engagements with advisory to engineering motions, including readiness, roadmaps and TBM/FinOps-aligned value discovery) and conclude on the basis of measured outcomes rather than hours. The common denominator is governance by design, with AI Control Towers, identity/risk guardrails and sovereign/regulated patterns embedded across all architectures, especially for highly regulated U.S. estates.

Productization of innovation: Innovation has moved from slideware to shippable, upgrade ready solutions that combine agentic AI (A2A), observability and industry

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IP. Multi agent libraries shift operations from prediction to resolution, while Store/IP accelerators reduce cycle time and drive consistent adoption.

Managed services rewritten: Run organizations are converging CloudOps, FinOps and RiskOps into Managed AgentOps, with human in the loop, XLA contracts and continuous modernization in run (back to box, release discipline, instance consolidation). Success is measured by automation density, governed AI at scale, upgrade velocity and demonstrable ROI.

Alliances and capability depth: Alliances emphasize observability interlocks and data fabric integration to ensure telemetry informs workflow decisions. Tuck in M&A strengthens talent benches and shortens the strategy to execution handoff, which is critical for U.S. enterprises seeking speed without sacrificing control. This enables providers to differentiate by running standardized, upgrade safe builds, shipping vertical playbooks and operating XLA/ROI dashboards in production.

Outlook (12–24 months) — what to expect and how to prepare

Emphasizing governed autonomy at scale:

- **Agents as a standard operating layer:** Expect expansion from L1/L1.5 into complex cross domain handoffs with A2A orchestration and human in the loop approvals.
- **Observability fused with workflows:** Telemetry and AIOps will drive self healing responses linked to business impact, shrinking MTTR while raising reliability.
- **Backbone architectures and data fabric:** Platform consolidation will continue, with CSDM/CMDB and knowledge modernization treated as prerequisites for safe AI scale up.
- **Vertical catalogs as on ramps:** Compliance ready blueprints remain the fastest route to outcomes in regulated sectors.

Key risks to manage:

- **Agent sprawl without control towers:** Absence of AI Control Tower oversight, lineage and rollback mechanisms can stall or reverse autonomy after incidents.
- **Skipping the foundations:** Weak CSDM/CMDB and knowledge hygiene degrade AI accuracy and change reliability, inflating risk just as automation scales.
- **Customization drag:** Heavy bespoke build erodes upgrade velocity and blocks adoption of the new capabilities in the Zurich release. Prioritizing back to box is the preferred default.

Leading indicators to watch:

- Growth in XLA linked commercials and capacity models in managed services
- Rise in pipelines focused on instance consolidation and factory replatforming
- Providers publishing reusable agent libraries and A2A blueprints rather than custom one offs
- Executive scorecards that assess data fabric maturity (CSDM/CMDB completeness and knowledge modernization) prior to AI activation

What enterprises should do now:

- **Institutionalize governance first:** Set up an AI Control Tower with policy, lineage and rollback criteria; mandate human in the loop oversight for material decisions; and align security and compliance artifacts to regulated workflows before scaling agents.
- **Contract for upgrade safe value:** Make back to box requirements, regression coverage and release cadences contractual, as well as link milestone payments to adoption and XLA metrics (deflection, MTTR and EX) rather than activity counts.
- **Integrate observability into action:** Integrate telemetry, service maps and runbooks directly into workflows to ensure incident priority reflects business impact and measure automation density in production.
- **Adopt vertical blueprints:** Select industry catalogs with pre built data and control models for BFSI, healthcare, telecom, manufacturing and the public sector to compress time to value and reduce risk.

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- **Budget for AI run time:** Implement post-go-live programs for skills, tuning and guardrails and align managed services to Managed AgentOps with outcome dashboards and continuous modernization in run.

What service providers should prioritize:

- **Governance by default:** Standardize AI Control Towers, identity and access controls, audit capabilities and sovereign/regulated deployment patterns across U.S. regulated verticals;
- **Productize acceleration:** Scale Store/IP accelerators and reusable agent libraries that are upgrade ready and instrumented with before/after scorecards
- **Modernize while running:** Treat back to box, release management and instance consolidation as day 2 services rather than separate projects to ensure innovations in Zurich remain adoptable
- **Sell outcomes, not effort:** Anchor proposals on automation density, upgrade velocity and XLA/ROI telemetry drawn from production, instead of staffing ratios

Conclusion — *The U.S. blueprint for the next ServiceNow decade moves from modernization to measurable autonomy*

The U.S. ServiceNow agenda has evolved from projects delivered to platforms governed. Buyers expect agentic AI to operate under explicit controls, observability to drive self healing operations and upgrade safe design to keep innovation adoptable. Providers that package governance by design, ship vertical blueprints and prove value with live XLA/ROI telemetry will define the next phase of the U.S. ecosystem. The era of customizing everything has ended; the new era of measurable, governed autonomy has begun.

In the U.S., *go live* marks the beginning. Leaders are designing governed autonomy with fixed foundations (CSDM/CMDB), orchestrated agents (A2A), observability infused with workflows and upgrade-safe design, delivering measured, repeatable outcomes.

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Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Accenture	Leader	Leader	Leader
Atos	Leader	Leader	Rising Star ★
Birlasoft	Product Challenger	Product Challenger	Contender
Brillio	Contender	Contender	Not In
Capgemini	Leader	Leader	Leader
CDW	Product Challenger	Product Challenger	Not In
Coforge	Leader	Rising Star ★	Leader
Cognizant	Leader	Leader	Leader
Cprime	Product Challenger	Not In	Product Challenger

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Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Deloitte	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader
EY	Market Challenger	Market Challenger	Market Challenger
Fujitsu	Product Challenger	Product Challenger	Product Challenger
Genpact	Leader	Product Challenger	Leader
GlideFast	Rising Star ★	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Leader
IBM	Market Challenger	Market Challenger	Market Challenger

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Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Infosys	Leader	Leader	Leader
InMorphis	Product Challenger	Product Challenger	Product Challenger
INRY	Not In	Product Challenger	Not In
Jade Global	Contender	Contender	Contender
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Leader	Product Challenger
LTM	Leader	Leader	Leader
NewRocket	Rising Star ★	Not In	Product Challenger
NTT DATA	Product Challenger	Market Challenger	Leader

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Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Orange Business	Product Challenger	Not In	Not In
Pathways	Contender	Contender	Contender
Proven Optics	Not In	Not In	Contender
Randstad Digital	Product Challenger	Product Challenger	Product Challenger
RapDev	Contender	Contender	Product Challenger
SoftwareOne	Not In	Not In	Product Challenger
Stefanini	Contender	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader

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Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Unisys	Contender	Product Challenger	Product Challenger
UST	Product Challenger	Product Challenger	Product Challenger
Virtusa	Not In	Not In	Contender
Wipro	Leader	Leader	Leader
YASH Technologies	Not In	Contender	Contender
Zaelab	Market Challenger	Not In	Not In

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The **ServiceNow Ecosystem Partners 2026** study highlights the latest partner developments shaped by rapidly evolving enterprise needs.

ServiceNow Consulting and Implementation Services (Professional Services)

ServiceNow Managed Services

Innovation on ServiceNow

Simplified Illustration Source: ISG 2026

Definition

ServiceNow is a key driver of digital transformation, offering a cloud-native platform that streamlines enterprise workflows across industries. As a market leader, it is rapidly evolving with a growing focus on AI and automation, supported by a mature ecosystem of providers delivering specialized, outcome-driven services.

Recent platform releases mark a strategic shift toward agentic AI, transforming enterprise workflows into autonomous, multi-agent systems. Yokohama and Zurich introduced foundational capabilities, including Vault for security, Machine Identity Console, and agentic workflow design with DevOps integration, that enable secure, scalable AI deployment.

With Gartner forecasting that over 60 percent of enterprises will adopt AI agent platforms by 2029, ServiceNow is positioning itself as the central AI agent control tower. The Zurich release advances this vision with Build Agent and vibe coding, allowing natural language prompts to generate production-ready applications. The Developer Sandbox ensures safe experimentation, while Agentic Playbooks and Now Assist deliver automation with human oversight. ServiceNow's strength lies in its ability to act as an integration mesh, connecting best-of-breed agent platforms such as Google Agentspace, AWS Bedrock, Microsoft Copilot and Anthropic. Trusted by over 80 percent of Fortune 500 companies since 2021, it leverages Workflow Data Fabric (WDF), Knowledge Graph and CSDM to unify enterprise data.

For partners, the opportunity is to deliver modular, composable agentic workflows aligned to GRC requirements, underpinned by domain expertise and outcome-driven models. Sustained value will depend on robust ModelOps, LLMOps and AgentOps capabilities to ensure compliance, debiasing and dynamic updates across industries.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services/solutions: ServiceNow Consulting and Implementation Services (Professional Services), ServiceNow Managed Services and Innovation on ServiceNow.

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

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Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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ServiceNow Consulting and Implementation Services (Professional Services)

This report is valuable for providers offering **ServiceNow consulting and implementation services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG analyzes how providers address consulting complexity, industry-specific needs and integration challenges within the ServiceNow ecosystem.

Strategy professionals

Should read this report to gain insights into the emerging trends in ServiceNow consulting, including AI-driven advisory and workflow optimization. It helps them identify partners capable of shaping long-term transformation strategies, aligning ServiceNow adoption with enterprise objectives and ensuring scalability across IT and business functions.

Technology professionals

Should read this report to explore providers' expertise in implementing ServiceNow modules and integrating them into enterprise systems for industry-specific solutions. It offers clarity on service providers' integration capabilities across ERP, CRM and legacy systems, enabling informed decisions for seamless deployment and alignment with enterprise architecture.

IT and business professionals

Should read this report to understand process maturity, design frameworks and best practices for ServiceNow adoption across diverse organizational environments. It provides insights into the best practices service providers follow for designing workflows, managing complexity and ensuring operational efficiency.

Digital transformation professionals

Should read this report to learn how service providers leverage ServiceNow's AI-first capabilities, low-code platforms and automation tools to deliver scalable solutions. It highlights strategies implemented by providers for mapping technologies to business outcomes, accelerating enterprisewide digital transformation, and driving innovation through integrated workflows and advanced analytics.

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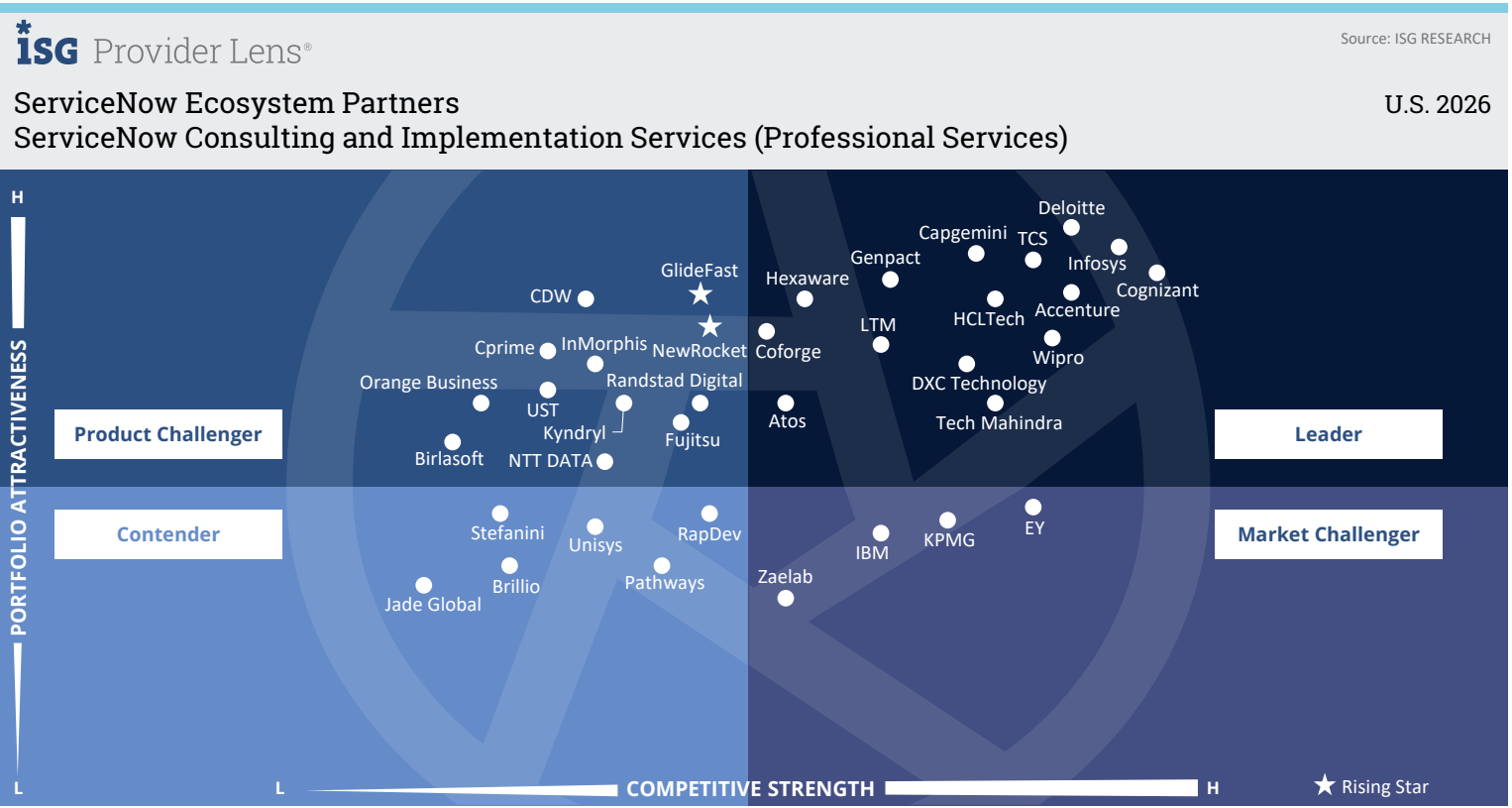

This quadrant evaluates provider's ability to transform **IT and non-IT** workflows by advising on readiness and designing upgrade-safe ServiceNow architectures that integrate **AI-enabled capabilities** and cross-suite implementations.

Tapati Bandopadhyay

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Definition

This quadrant evaluates providers that design, deliver and scale outcomes on the Now Platform through comprehensive professional services. It includes consulting and advisory services for AI-driven GRC and value discovery, solution strategy, readiness assessments and the use of Now Assist to align business cases, risk controls and adoption plans. It also covers implementation and integration of ServiceNow modules and full-stack orchestration across internal and external systems, leveraging robust interfaces, data models and Now Assist to accelerate time to value.

The quadrant assesses business services capabilities across IT, HR, customer, asset and field functions, as well as industry-specific solutions for regulated, complex verticals. Workflow engineering is evaluated through service architecture modernization, including ITSM, CSM and HRSD, with an emphasis on automation, analytics and continuous improvement. Providers are rated on advisory depth, delivery quality, platform architecture, AI implementation, domain blueprints and measurable outcomes, such as experience, risk reduction and operational efficiency, achieved through secure, scalable and compliant ServiceNow practices.

Eligibility Criteria

1. **Strategic advisory and value discovery:** Expertise in **strategic consulting, solution road maps, readiness assessments** and **business value identification** using frameworks such as AI GRC
2. **Platform implementation and integration:** Proven ability to deliver **end-to-end technical implementations, orchestrate complex processes** on the Now Platform and integrate with diverse enterprise systems
3. **Business-centric solution architecture:** Skill in designing **robust service architecture** and developing **industry-specific** and **function-focused solutions**
4. **Workflow engineering and optimization:** Technical mastery of core ServiceNow workflows, including **ITSM, CSM and HRSD**, with a track record of **enhancing process maturity** and **service optimization**
5. **AI and innovation adoption:** Success in consulting and deploying **modern platform capabilities**, including GenAI features such as **Now Assist**
6. **Certified talent and expertise:** A strong team of **certified ServiceNow professionals**, including holders of **advanced credentials** such as **certified technical architect** (CTA), to ensure high-quality delivery
7. **Proven client success and ROI:** Documented client outcomes linking technical execution to strategic value, showcasing **measurable ROI** and **business impact**

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Observations

Over the past 12–18 months, the U.S. consulting and implementation market has pivoted from module delivery to advisory-led, outcome-priced modernization, with deals opening on value discovery (TBM/FinOps, readiness and roadmap) and closing on measurable KPIs rather than hours. Providers are standardizing back to box and using upgrade-safe architectures to reduce technical debt and maintain release velocity, while tuck-in M&A deepens consulting and talent benches to tighten the strategy-to-execution handoff. GenAI has moved from trials to production as Now Assist skills and A2A patterns are embedded into ITSM/ITOM, HRSD, CSM and risk, with curated agent libraries and early access programs signaling scale rather than experimentation. Implementation styles converge on observability-led orchestration, including Dynatrace and ITOM interlocks, telemetry-driven CMDB hygiene and runbook execution, to ensure incident priority tracks business impact. Demand is industry-specific, with BFSI, healthcare, telecom, manufacturing and public sector expecting industry blueprints and pre-built IP (including Store assets) that compress timelines and boost adoption. Governance has become architectural, with AI Control Towers, risk/identity guardrails and sovereign/regulated patterns are table stakes in regulated U.S. sectors. Value realization is explicit, as outcome contracts, benefit calculators and experience diagnostics link EX, MTTR and deflection to funding, rewarding partners that blend consulting rigor, agentic AI and upgrade discipline to deliver durable transformation in 2026.

From the 42 companies assessed for this study, 37 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

Accenture secures its leadership through *Reinvention Services*, utilizing its 2025 Global Elite Partner of the Year status to deliver complex, industry-specific implementations that combine deep consulting expertise with large-scale digital core modernization.

Atos expands its advisory-led consulting and implementation practice, leveraging Elite partner status, broad certifications and local hubs. It uses sector references and *Envision Consulting* to standardize, de-customize and modernize estates for upgrade safe adoption across the U.S.

Capgemini's Intelligent Orchestration on Now (ION) framework and deep domain expertise enable it to deliver complex, large-scale implementations that move beyond IT-centric siloes to drive enterprise-wide digital transformation across regulated sectors in the U.S. and globally.

Coforge is strengthening its ServiceNow implementations by expanding industry focused capabilities across diverse industries, supported by targeted acquisitions, deep certification investments and structured delivery frameworks aligned with ServiceNow best practices.

Cognizant leverages its Global Elite status and *AI Builder* strategy to deliver large-scale implementations, focusing on eliminating technical debt and modernizing legacy data foundations into a unified System of Intelligence for complex, regulated industries.

Deloitte maintains its industry leadership by merging high-level strategy with technical depth. It uses its ServiceNow Assets & Solutions Group and large-scale implementation capability to deliver AI-driven value discovery and full-stack orchestration for U.S. enterprises.

DXC Technology delivers industry-focused implementations by scaling Assure BPM and Smart Apps for insurance, consolidating multi-instance estates and strengthening architect certifications, led by its VYNE value framework and deep partnerships with ServiceNow, Dynatrace and Boomi.

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genpact

Genpact scales its consulting led programs by pairing domain SMEs with FSO, MCO, HRSD and procurement blueprints, expanding certifications under an Enterprise Training Agreement and re-platforming legacy estates via factory methods to accelerate autonomous deployments.

HCLTech

HCLTech delivers upgrade safe, value tracked transformations by leveraging its AI first programs, Transform to Now accelerators and industry blueprints, reinforced by Experience and Innovation Labs and Emerging Industry Partner of the Year recognition.

HEXAWARE

Hexaware's consulting-led approach is supported by co-build engagements with ServiceNow, expanding industry apps, rising expert certifications and conducting platform assessments to standardize architectures and accelerate cross suite implementations.

Infosys

Infosys excels in consulting and implementation with an AI first, industry led consulting motion, backed by certified talent pipelines, ESM Café accelerators and a consistent record of cross suite transformations delivered through its Global Elite partnership model.

LTM

LTM offers consulting-led transformations through a comprehensive ServiceNow partnership, industry plays for financial services and manufacturing and flagship offerings that standardize cross suite implementations and integrations for faster adoption and measurable outcomes.

TCS TATA CONSULTANCY SERVICES

TCS modernizes its consulting led, AI first transformations using its proprietary accelerators, such as RapidNow accelerators, aligning with ServiceNow field teams to deliver composable architectures and cross suite implementations across IT and business domains.

TECH mahindra

Tech Mahindra's consulting led transformations infuse industry workflows with co created intellectual property (NetOps.now and B2B Digital Concierge) and an AI first Orion stack, supported by Elite partnerships and a structured go to market across priority verticals.

wipro

Wipro differentiates its ServiceNow consulting and implementation capabilities by positioning the platform as an enterprise operating layer, combining consulting led discovery, strong industry alignment and AI infused solution engineering.

GlideFast consulting

GlideFast (Rising Star) strengthens its consulting and implementation capabilities by expanding its reach within the federal/public sector through prime channel partners and scaled delivery across regulated domains to enable fixed-scope, rapid deployments for complex, multi-module ServiceNow programs.

NEWROCKET

NewRocket (Rising Star) drives high-value transformation with its Employee Workflow Partner of the Year status and the FlightPath.AI methodology, launching the Intelligent Agent Crew to rapidly deploy purpose-built, agentic AI solutions for complex U.S. enterprises.

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Leader

"With proven replatforming at a global scale and industry aligned blueprints, Atos standardizes complex IT estates, accelerates adoption and anchors measurable risk and experience gains on the Now Platform."

Tapati Bandopadhyay

Atos

Overview

Atos Group is headquartered in Bezons, France. It has more than 63,000 employees across 61 countries, operating under two brands — Atos for services and Eviden for products. In FY24, the company generated €9.6 billion in revenue. Atos is an Elite ServiceNow partner with over 500 consultants and 1,000 certifications, delivering large-scale replatforming and standardization programs and domain-specific solutions across ITSM, IRM and SecOps, HRSD and observability. Offerings such as Envision (strategy and roadmap), AI Insight and AI Ignite (Now Assist readiness and activation) and SecureHorizon (NIS2 compliance for IRM) shape advisory engagements and translate strategy into delivery.

Strengths

Observability-led architectures: Atos packages Dynatrace-ServiceNow integrations into tiered offerings, such as foundation, enhanced, AIOps, autonomous-linking service maps, AI-derived root-cause analysis and runbook execution to ServiceNow incidents and change flows. This gives U.S. teams a structured path from visibility to automation without a tooling overhaul.

Domain-aligned blueprints: Atos brings industry-specific trajectories into consulting and implementation, including financial services (operational resilience and risk), healthcare (EX and service experience), manufacturing (plantwide workflow orchestration) and public sector (sovereign and on-premises patterns). It highlights programs where ITSM, HRSD, SPM, ITOM and IRM converge to reduce change failures, automate controls and consolidate toolchains. These domain blueprints help U.S. clients translate enterprise standards into data models, role design and integration guardrails fast, shortening the path to value for multi-tower engagements.

AI-ready consulting: Atos formalizes AI discovery and activation through AI Insight and AI Ignite, aligning Now Assist readiness with use case curation, governance case curation, governance and value hypotheses. The strategy builds an Atos Data and AI line targeting 10,000 people by 2028, with a dedicated ServiceNow AI delivery pod in India and a pilot AI survey initiative with ServiceNow marketing.

Caution

Atos' Dynatrace-ServiceNow integration provides a strong foundation for its service portfolio. However, the company should offer U.S. bundles with improved pricing and reference outcome ranges to shorten presales cycles and distinguish consulting and implementation deliveries.

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ServiceNow Managed Services

This report is valuable for providers offering **ServiceNow managed services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights providers' ability to deliver continuous improvement, AI-driven monitoring, and cost optimization in managed ServiceNow environments.

Strategy professionals

Should read this report to evaluate providers' capabilities in managing ServiceNow environments across portfolios. It offers insights into service providers' governance models, SLA-driven performance and cost optimization strategies that align with enterprise goals for resilience, scalability and operational excellence while ensuring compliance and risk mitigation.

Service delivery professionals

Should read this report to understand how managed service providers maintain service quality, ensure compliance and deliver uninterrupted platform performance. The report offers actionable insights into proven operational practices, automation-driven monitoring, proactive issue resolution and AI-enabled observability, enabling professionals to benchmark and adopt strategies that enhance reliability and efficiency across the ServiceNow ecosystem.

Service line and functional

Should read this report to rationalize the fitment of ServiceNow resources and workflows across IT and business services. The report provides clarity on how providers offer managed services to optimize resource allocation, improve process efficiency and support enterprisewide service delivery while reducing operational overhead and complexity.

Operations managers

Should read this report to learn how managed service providers ensure platform stability, risk management and cost efficiency. It explains service providers' approaches to AI-enabled observability, license optimization, and continuous improvement for long-term operational success. These practices help organizations achieve predictable performance and measurable business outcomes.

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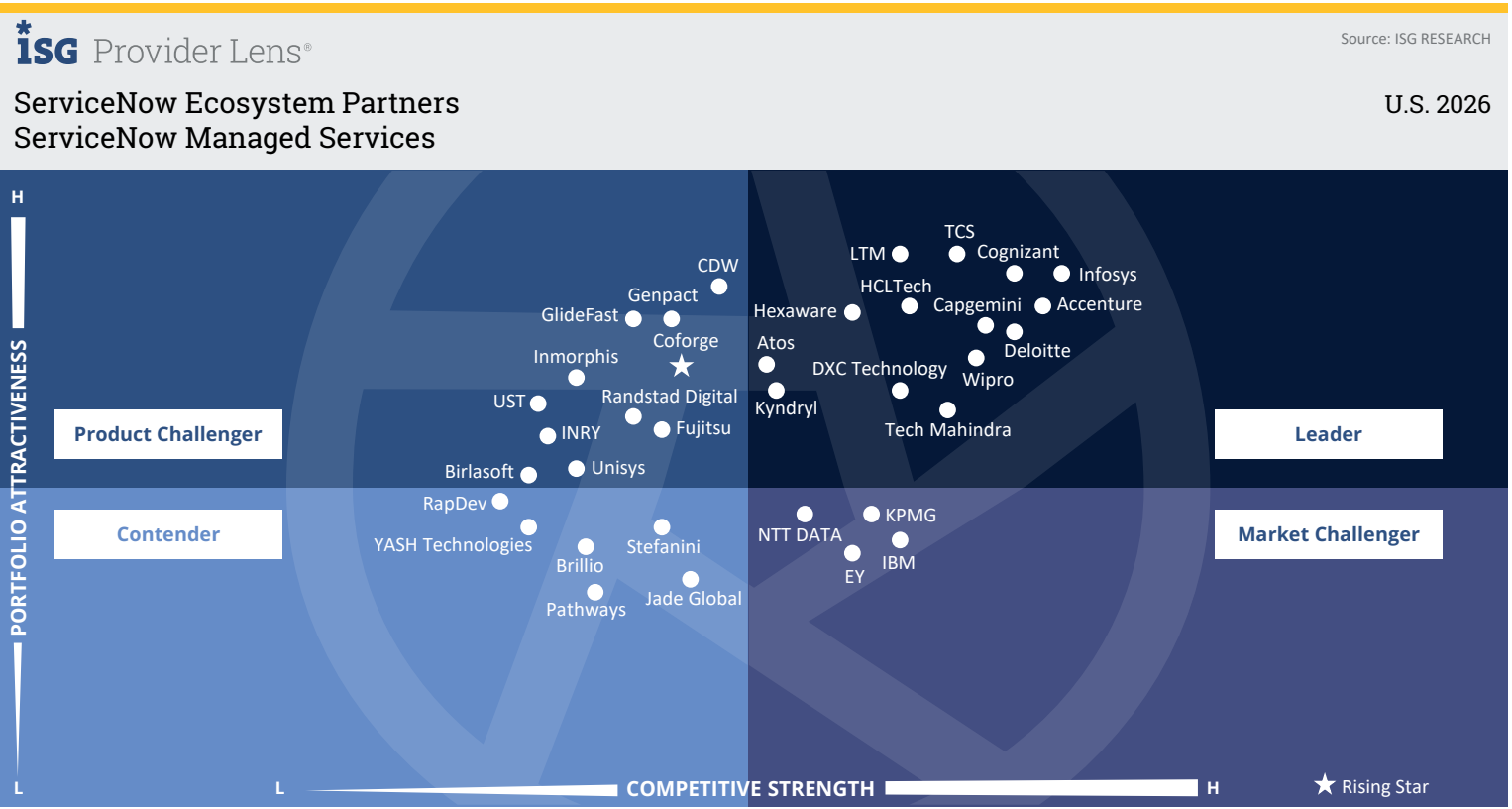

This quadrant evaluates provider's ability to operate the Now Platform end to end by unifying **CloudOps, FinOps and RiskOps** with governed AI operations, observability and continuous modernization to deliver reliable, measurable outcomes.

Tapati Bandopadhyay

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Definition

This quadrant assesses providers that operate the Now Platform as a business-critical service, managing, securing and optimizing it end to end. The scope includes platform operations anchored by an AI governance control tower for observability, risk and financial oversight. Key capabilities span CloudOps (event management, topology, AIOps) to ensure availability and SLO compliance; FinOps for cost optimization; RiskOps integrating IRM/GRC, privacy and audit; and managed AgentOps for safe, scalable Now Assist/GenAI deployment.

The quadrant also evaluates platform performance through personalization, optimization and ServiceNow Impact-driven value realization. Providers must deliver platform modernization (adoption of latest releases and features, de-customization), digital experience management (agent/end-user experience, XLAs) and process mining to accelerate automation and maturity. Success is measured by automated operations, governed AI use, predictable release cycles, cost savings, improved experience metrics and compliance, delivered through proactive SRE services and outcome-based KPIs.

Eligibility Criteria

1. **Comprehensive platform operations**: Ability to manage holistic operations, including CloudOps for **unified observability, FinOps for TCO optimization** and integrated **RiskOps (GRC)** for stability, cost-efficiency and compliance
2. **AI governance and management**: Ability to implement **a robust AI governance framework**, such as a **control tower**, to oversee, monitor and report **AI usage and performance**
3. **Value realization framework**: Proven success in **driving measurable business outcomes** through structured programs aligned with **ServiceNow Impact**
4. **Platform modernization and performance**: Expertise in **continuous optimization, technical debt reduction** and **seamless upgrades** to maintain platform efficiency
5. **Digital experience monitoring**: Ability to offer services that track and **enhance user satisfaction, engagement** and **adoption** across the platform
6. **Process mining and automation**: Expertise in leveraging **process mining** to identify inefficiencies and deploy **intelligent automation** for ongoing service improvement
7. **Unified observability on Now**: Ability to provide **native, real-time visibility** into **operational health, security** and **performance metrics** on the Now Platform

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Observations

Managed services has evolved from ticket-based *run* to AI-governed platform operations that unify CloudOps, FinOps and RiskOps under one operating model. Providers are standardizing managed AgentOps, including Now Assist skills, A2A patterns and curated agent libraries, to move from alerts to auto remediation with human-in-the-loop controls, while observability-led practices, such as ITOM, Dynatrace style telemetry, runbooks and CMDB hygiene, tie incident priority to business impact. Over the last 12–18 months, outcome pricing and ServiceNow Impact–aligned value frameworks have become the commercial norm, with leaders measuring EX, CSAT, MTTR and deflection in live dashboards and using benefit calculators to secure renewal and expansion. Modernization now happens in run, with back-to-box refactoring, release management and factory-scale instance consolidation ensuring seamless adoption of Zurich's new features without destabilizing IT estates. U.S. demand is also shifting to verticalized, multi-entity focus where sectors such as banking, healthcare, telecom and the public sector are expecting SIAM/MSP operating models, domain separation and license optimization packaged as standard catalog items. Governance has become architectural, with AI Control Towers, agent/machine identity, audit trails and sovereign/regulated hosting patterns (including privacy and EU or sector mandates for U.S. multi-nationals) as table stakes. Positioning favors providers that have scaled certified talent and industrialized automation and self-heal, often accelerated by tuck-in M&A to deepen FinOps, AI and talent benches. In summary, ServiceNow managed service offerings in the U.S. are evaluated on automation density, governed AI at scale, upgrade velocity and demonstrable ROI rather than hours consumed.

From the 42 companies assessed for this study, 35 qualified for this quadrant, with 14 being Leaders and one Rising Star.

Accenture dominates the managed services landscape by integrating its global IT customer experience into its service delivery, offering an outcome-based *run* model that leverages ServiceNow Impact to achieve a 50 percent reduction in major incidents for global enterprises.

Atos strengthens its managed service offering through secure SaaS, on premises and sovereign hosting, SIAM operations and nearshore/offshore delivery, consolidating vendors for clients and improving service quality with proactive governance and around-the-clock platform support.

Capgemini differentiates its managed services through Digital SIAM and outcome-tracked models, leveraging its vast certification pool to achieve up to 50 percent maintenance cost reductions and improved change velocity for multi-vendor, hybrid-cloud ecosystems.

Cognizant's managed services are powered by its Neuro IT Operations, an AI-powered platform that enables self-healing environments and proactive management, helping global clients optimize hybrid cloud estates while improving operational velocity and EX.

Deloitte's ServiceNow managed services leverage the *Operate to Innovate* model, which focuses on platform de-customization and ServiceNow Impact-driven value, ensuring that clients across diverse regions achieve long-term ROI through proactive, automated operations.

DXC Technology delivers proactive, KPI governed managed services that stabilize complex platforms, securing multi-year renewals and expanding regional AMS footprints via CIR operating models, data governance toolkits and autonomous operations patterns to enhance resilience and experience.

HCLTech delivers AI-native managed services with SIAM as a-service, prebuy MSP licensing and *modernization in run*, operationalizing Now Assist and SAM governance to enhance resilience, reduce run costs and sustain compliant, multi entity platform operations.

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Hexaware scales managed services through HexAssure, implementing multi-entity governance, license optimization and AI Control Tower guided operations, while adding DORA aligned risk workflows and MSP constructs to improve resilience and upgrades across regulated environments.

Infosys elevates its managed services via outcome based constructs, FinOps to RiskOps coverage and governed back to box modernization, using ESM Café, license optimization and compliance runbooks to sustain measurable platform performance across regulated industries.

Kyndryl leverages its AI-powered Bridge platform to deliver zero-touch managed services, integrating real-time AIOps and cyber resilience frameworks that transform complex legacy infrastructures into autonomous, resilient digital estates for enterprises across U.S.

LTM's ServiceNow managed services unify CloudOps, FinOps and RiskOps under a single operating model, combining instance hardening IP, MSP+ subscription constructs and *Now-on-Now* practices to drive resilient, upgrade ready platform operations.

TCS' MSP and shared services models embed agent assisted run operations, license value realization and KPI driven governance to modernize platforms and sustain experience and reliability improvements across its managed services portfolio.

Tech Mahindra's platform as a service constructs, prebuy/MSP models and DBOT (Design Build, Operate, Transfer) transitions combine governance, release discipline and value tracking to extend run and change operations across technology, customer, employee and industry workflows.

Wipro's AI-led managed services, led by the WINGS platform, combines Now Assist, agent libraries and AI driven transitions to run large, multi entity estates. Supported by prebuy licensing flexibility, this approach ensures measurable gains in productivity, automation and SLA performance.

Coforge (Rising Star) differentiates its managed services through a run and enhance model that combines platform governance, AIOps driven accelerators and industry specific operational expertise, enabling stable operations while continuously improving adoption and business value.

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Leader

"Atos combines its scalable ATF/SMaaS solution with tiered Dynatrace-ServiceNow AIOps to deliver governed, automated platform operations, enabling clients to envision and implement the right solutions on ServiceNow platforms."

Tapati Bandopadhyay

Atos

Overview

Atos is headquartered in Bezons, France. It has more than 63,000 employees across 61 countries, operating under two brands — Atos for services and Eviden for products. In FY24, the company generated €9.6 billion in revenue. Its managed services offer 24/7 coverage, advisory and continuous enhancements, with round-the-clock capacity expanding through Manila and a global Google Distributed Cloud (GDC) network and regional customer operations offices, including the one in Dallas. Its observability to automation capability is productized through Dynatrace-ServiceNow tiers (foundation to autonomous) while SecureHorizon integrated with risk management (IRM) anchors regulated RiskOps.

Strengths

Proprietary run engine: Atos' Service Management as a Service (SMaaS) is governed through Atos Technology Framework (ATF) and supports 1,000 external customers and close to 1 million end users. The model provides 24/7 monitoring, plus light advisory or roadmap work and integrates continuous enhancements into steady-state operations to keep platforms stable while releasing incremental value without disruptive replatforming.

Managed AgentOps governance: Atos embeds Now Assist (summarization, resolution notes, Virtual Agent) through AI Insight and AI Ignite to transition from pilot to governed AgentOps. Polaris serves as the AI spine for cross-platform orchestration and Atos is piloting a ServiceNow AI survey initiative to shape adoption playbooks. In managed services, these capabilities are governed by usage guardrails, human-in-the-loop controls and outcome dashboards rather than ad hoc activation.

Experience uplift in steady state: Atos' managed services incorporate Virtual Agent and Live Chat metrics into continuous improvement. A referenced program moved to SaaS, introduced VA/Live Chat, and achieved 87 percent CSAT on chat, exceeding the 80 percent target, and 80 percent response within 40 seconds. These outcomes establish a measurable digital experience (DX) cadence, which is an agent and end user experience tracked through actionable KPIs rather than ambiguous satisfaction claims.

Caution

Even as Atos expands its U.S. ServiceNow managed services, it can benefit by packaging governance-ready run bundles (including decustomization playbooks, disciplined release cadences and AgentOps guardrails) to accelerate upgrades and scale safe GenAI adoption across regulated.

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Innovation on ServiceNow

Who Should Read This Section

This report is valuable for service providers offering **ServiceNow solutions** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief strategy and innovation professionals

Should read this report to understand how service providers support ServiceNow innovation via competitiveness and long-term growth. It offers insights into providers' ability to deliver disruptive solutions using AI, workflow intelligence, and automation, enabling strategic planning for future-ready enterprises and accelerating digital transformation initiatives within the ServiceNow ecosystem.

Business line managers

should read this report to explore ServiceNow's IT and non-IT capabilities, including Built with Now and Built on Now solutions. It explains how service providers support innovations to help achieve cost-reduction goals, improve CX and accelerate digital transformation across business units while ensuring scalability and operational agility.

Engineering teams

Should read this report to gain insights into software development on ServiceNow, including the development of intellectual property assets, accelerators and industry-specific applications. It highlights best practices executed by service providers for leveraging App Engine, Integration Hub, and Workflow Data Fabric to create scalable, innovative solutions that meet evolving enterprise needs and industry standards.

Technology and application development professionals

Should read this report to learn about the latest ServiceNow features, functionalities, and integration options. It provides insights into how service providers configure AI Agent Studio, deploy GenAI workflows and use low-code platforms to deliver advanced enterprise solutions that enhance agility and drive measurable business impact.

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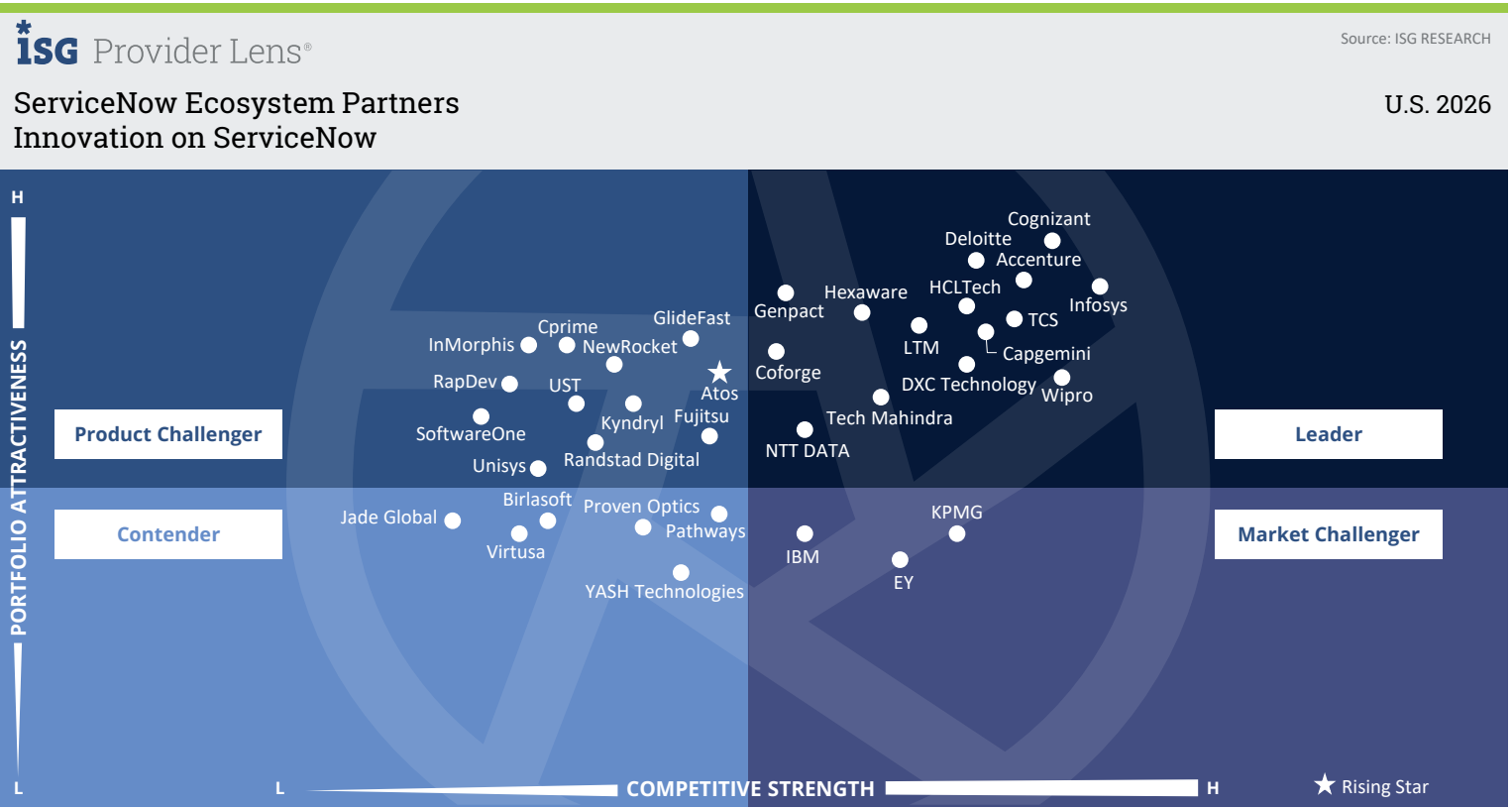

This quadrant assesses providers that accelerate **digital transformation** by **productizing AI** and **agentic innovations** on the platform such as **Now Assist** skills and **A2A patterns** into governed, cross workflow solutions that scale beyond pilots.

Tapati Bandopadhyay

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Definition

This quadrant evaluates providers that design, engineer and operationalize innovations on the ServiceNow AI Platform, integrating AI agent orchestration, Workflow Data Fabric (WDF) and AI experience into secure, reusable, outcome-driven solutions. Providers must architect robust WDF (CMDB/CSDM); govern source-of-truth stores, such as RaptorDB; and enable model grounding, lineage and policy controls. They must demonstrate expertise in Generative AI Controller for safety, telemetry and cost governance and productize Now Assist across applications.

On the *build* side, providers must industrialize Build with Now, using Creator/Studio, AI Search, App Engine Studio, Flow Designer, Integration Hub and Automation Center, to create agile workflows and automate processes. Proof points include agentic use cases, accelerators, scoped apps, CI/CD pipelines, testing rigor and upgrade-ready patterns. Competency is measured by time to value, Pro/Enterprise feature adoption, experience uplift, risk reduction and scalable platform economics achieved through governed, data-aware, AI-assisted builds.

Eligibility Criteria

1. **Data foundation mastery**: Proven expertise in designing **robust CMDB/CSDM structures** to support intelligent, scalable workflows
2. **AI agent and model proficiency**: Use of **Generative AI Controller** and **AI agents** for complex orchestration and automated decision-making, backed by referenceable case studies
3. **Custom application development**: Substantial experience in **building scalable, complex apps** using **App Engine Studio**, with a portfolio of deployed business applications
4. **Advanced automation and integration**: Expertise in **enterprise-grade automation** through **Flow Designer, Integration Hub and Automation Center** to streamline end-to-end processes
5. GenAI integration experience: Ability to embed GenAI into **custom solutions** using **Now Assist Creator, Studio** and **AI Search** for intelligent UX
6. **Workflow Data Fabric expertise**: Experience in building **high-performance, data-intensive apps**, leveraging **Workflow Data Fabric** beyond standard modules
7. **Innovation portfolio**: Ability to showcase unique, **market-differentiating solutions** combining **ServiceNow AI Platform's build** and **intelligence capabilities** to address novel business challenges

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Observations

The U.S. ServiceNow ecosystem has witnessed the most accelerated growth in terms of innovation in the past 18 months. Innovation is reshaping from slideware to shippable, upgrade-ready solutions that blend agentic AI, observability, governance and industry intellectual property. Service providers are productizing multi-agent patterns using Now Assist skills and agent-to-agent (A2A) interoperability to progress from prediction to resolution across IT, HR, customer and risk workflows. Several of them are fielding large, ready-to-deploy agent libraries and early-access skills that indicate real production scale rather than pilots. While innovation often begins with advisory, the differentiator is engineering discipline. Back to box, upgrade-safe architectures, Store or intellectual property accelerators and factory methods compress release cycles while ensuring seamless adoption of Zurich's new features. Observability-led design converge with AI, including Dynatrace and ITOM interlocks, CMDB hygiene and runbook automation, which tie automation density to business impact in live operations.

Governance is now part of the product, with AI Control Towers, agent and machine identity and audit trails embedded by design, alongside sovereign and regulated deployment patterns that U.S. multi-nationals demand as they operate under strict regimes. Concrete references from service providers suggest substantial shifts. Deloitte highlights over 100 ready-to-deploy agents coordinating enterprise workflows, while HCLTech brings early access participation (NASK/A2A) to strengthen agent skills before the General Availability stage. Conversely, Cognizant is strengthening Agent Foundry/Workflow Data Fabric to operationalize agent networks, and TCS is scaling its innovation with RapidNow accelerators and Crystallus on Now.AI. NewRocket's FlightPath. AI and Intelligent Agent Crew convert an AI-first design into governed releases. On the demand side, BFSI, healthcare, telecom and manufacturing clients seek industry blueprints that bundle data models, controls and process templates to shorten time to value and increase adoption. Funding behavior is also shifting, wherein outcome dashboards, FinOps/TBM and experience KPIs (EX, MTTR and deflection) are built into innovation programs, making RoI measured rather than promised and rewarding providers that can combine agent networks, observability and governance into modular, upgrade-safe products for U.S. enterprises.

From the 42 companies assessed for this study, 36 qualified for this quadrant, with 15 being Leaders and one Rising Star.

accenture

Accenture excels the next frontier of enterprise automation through its AI Lighthouse program and strategic partnership. It is co-developing agentic AI workflows and Sovereign Cloud solutions that allow highly regulated industries to deploy autonomous, decision-making agents securely.

Capgemini

Capgemini pioneers the *agentic-powered business* by embedding Now Assist and autonomous AI agents into industry-specific workflows, such as DORA compliance for finance, ensuring safe, governed and data-aware innovation across ServiceNow.

Coforge

Coforge focuses on co building with ServiceNow via a steady pipeline of Store apps and GenAI first industry offerings. Using the Helios and Quasar platforms, it turns agentic AI and end to end workflow automation into operational solutions.

cognizant

Cognizant pioneers agentic AI networks that automate multi-step tasks across departments through its AI Lab and Agent Foundry. By integrating Now Assist with proprietary context engineering, it ensures autonomous agents make reliable, situational business decisions.

Deloitte.

Deloitte's Agentic Workforce co-develops multi-agent systems and industry-specific intellectual property, such as FastForward EX and Telco360Connect, integrating Now Assist and Workflow Data Fabric to automate complex decision-making in highly regulated sectors.

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DXC Technology's AI Innovation CoE productizes Now Assist skills, bespoke agents and early access A2A/MCP patterns. It launches Assure Smart Apps and domain agents for fraud, policy alignment and ATM/municipal operations to deliver governed, upgrade safe and outcome driven innovation at scale.

Genpact productizes multi agent packs for ITOps and source to pay. It invests in an AI Gigafactory to codify guardrails, industry agents and outcome based adoption through its agentic AI portfolios and A2A patterns with hyperscalers.

HCLTech's innovation centers around AI Factory, A2A orchestration and custom agents and skills on the Store. Co-innovated with ServiceNow and NVIDIA, these capabilities are proven through innovation labs and client zero programs for governed, reusable outcomes.

Hexaware's innovation agenda integrates Tensai Agentic Mesh, the DEVIL framework and Now Assist skills with Workflow Data Fabric, productizing store apps and insurance intellectual property, while the CyberSolve acquisition strengthens SecOps and IRM packs and improves AI governance for agentic solutions.

Infosys leads innovation with a GenAI/agentic AI portfolio, an AI Control Tower and agent fabric within its Integrated Platform Solution, and store ready assets from ESM Café that productize Now Assist skills and orchestrate reusable enterprise agents.

LTM's innovation is driven by autonomous IT, AI-powered CRM and domain solutions such as AI Smart Underwriter, pairing Now Assist governance with reusable blueprints and joint go to market motions to scale agentic use cases.

NTT DATA's *AI-native* services are led by its proprietary Smart AI Agent™ Ecosystem and specialized AI agents integrated with ServiceNow's Workflow Data Fabric, enabling autonomous, cross-industry process orchestration while maintaining rigorous responsible AI governance.

TCS scales innovation via Crystallus on Now.AI, an Agentic AI Factory and partner-embedded solutions, productizing industry packs and upgrade ready blueprints that integrate Now Assist with data aware workflow foundations.

Tech Mahindra accelerates innovation by integrating agentic AI with Creator/Studio builds and workflow data foundations. It productizes accelerators and scales partner lab co-innovation to deliver governed AI agents and reusable blueprints across diverse domains.

Wipro fosters innovation through Wipro Engineering; industry solutions such as SmartProcure, TelcoAI360 and CyberTransform; and a growing AI influenced pipeline reinforced by Partner Labs, AI hackathons and co-innovation via Azure Marketplace and ServiceNow.

Atos (Rising Star) differentiates itself across innovation via its new releases such as SecureHorizon, AI programs (AI Ignite/ AI Insight) and Dynatrace ServiceNow observability packages, supported by an AI first investment initiative to productize agentic workflows.

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Rising Star

"With AI Insight/Ignite and sovereignty patterns, Atos operationalizes Now Assist and agentic workflows while preserving auditability and time to value."

Tapati Bandopadhyay

Atos

Overview

Atos is headquartered in Bezons, France. It has more than 63,000 employees across 61 countries, operating under two brands — Atos for services and Eviden for products. In FY24, the company generated €9.6 billion in revenue. Atos builds innovations on and with ServiceNow by productizing compliance and AI patterns and by coupling observability telemetry with Now workflows. Offerings include Secure Horizon (NIS2 compliance for IRM) available on the tiered Dynatrace-ServiceNow packages from *Foundation* to Autonomous and AI Insight/AI Ignite to activate Now Assist and agentic use cases. The U.S. focus is on AI Insight/AI Ignite for Now Assist readiness and ROI-driven pilots, with plans to publish value bundles tailored for U.S. clients.

Strengths

Tiered AIOps blueprint: Atos ships a tiered Dynatrace-ServiceNow integration that progresses from SmartScape driven CMDB updates to AI root cause backed incidents and runbook execution (ServiceNow or Ansible). This staged design lets teams adopt only what they can support, then move to automation once telemetry and service maps are trustworthy. The construct shortens time-to-value, enabling customers to move to precise, AI assisted remediation without rearchitecting every time.

AI activation packages: Atos runs AI Insight and AI Ignite to convert Now Assist interest into governed deployments, covering readiness, use case curation and cost/telemetry guardrails. The practice is also piloting a ServiceNow AI survey and has a 15 person AI delivery team in India to prototype patterns. These motions aim to compress advisory cycles and produce quantifiable data for summaries, virtual agent (VA) deflection and notes generation, with human in the loop validation.

Sovereignty by design: Atos brings on premises and sovereign ServiceNow experience paired with Secure Horizon on IRM and SecOps/vulnerability response (VR) run patterns, enabling *air gapped* or limited egress approaches while retaining upgradeability. For innovation programs, sovereignty capacity prevents dead ends, allowing teams to still activate agent workflows, integrate approved LLM endpoints and prove lineage/traceability.

Caution

While Atos has successfully activated its AI capabilities, it can focus on *Safety and Success Kits* for businesses. By creating clear rules for AI behavior, tracking spending and offering *Sovereign* options, Atos can help industries such as healthcare and government roll out AI agents with total confidence and zero guesswork.

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Appendix

The ISG Provider Lens® 2026 – ServiceNow Ecosystem Partners study analyzes the relevant service providers in the U.S. market, based on a multi-phased research and analysis process and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of March 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of ServiceNow Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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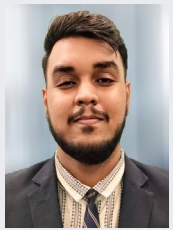
Lead Author

Dr. Tapati Bandopadhyay
Lead Analyst

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Enterprise Context and Global Overview Analyst



Arnab Das
Research Analyst

Arnab is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens studies on Oil & Gas and ServiceNow respectively. He supports the lead analysts in the research process and authors the enterprise context and global summary reports with market trends and insights.

He carries out research delivery for both primary and secondary research capabilities. Arnab comes with 2 years of experience across business, technology and academic research and writing.

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Study Sponsor

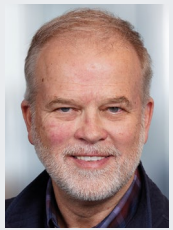
Heiko Henkes

Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

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ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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ISG Provider Lens®

MARCH, 2026

REPORT: SERVICENOW ECOSYSTEM PARTNERS

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